

Searching Video 1: Basic Concept Overview

<i>Speech</i>	<i>Cursor Actions</i>
Sumac has powerful searching capabilities so you can find anything in your database; contacts, donation information, client and volunteer data, memberships, tickets, everything!	
This video guides you through the basic concepts of searching in Sumac. It covers: Basic searching features, Search Criteria and Operators, Searching in Lists, and Searching with Multiple Criteria. It also shows examples of some common searches.	Show pic of list: Basic Concept of Searching, Search Operators, Searching in Various Lists, Searching Multiple Criteria
Searching your data is about more than just being able to find things. Effective searching brings many, far-reaching benefits: <ul style="list-style-type: none"> • Focus. Communicate with exactly the best group of people on any particular issue, so your constituents see only communications that are relevant to them. • Analyze. Look at your data from many different angles, combinations, and perspectives to gain insight. • Assess. Report and focus on what really matters. • Enhance data. Search to find data inconsistencies, then clean them up in bulk. 	Title: How Searching Helps You
Once you've mastered searching, you'll be amazed at what you can do. So, let's get started!	
Each list in Sumac stores a particular type of data. The Contact List holds information about contacts, the Donations List holds donation records, the Communications List has communications. When you're trying to find certain things in your Sumac database, search for it within the appropriate list. For example, if you are looking for contact data, find it by searching in the Contacts List. If you are looking for donation data, find it by searching in the Donations list. If you are looking for membership data, search in the Memberships list. Let's start in Contacts.	Show console; point to Contacts point to Donations point to Communications open Contacts (make sure residence city and Contact Types are showing in a column)
Searching features work the same way in every list. The Search panel is located at the top of the list window.	Point to searching area at top

<p>In the Search Panel, notice the Search Type drop-down menu. This lets you access the different search criteria available for the list you're looking at. In the Contact List, the Search Type drop-down menu has search criteria relating to contacts, like contact types, communication preferences, or even specific fields within the contact record.</p>	<p>Open search type menu. Point to contact types, comm. Preferences, and field</p>
<p>Let's do a search with only one search criterion: find our Board Members. In most Sumac databases, board membership is recorded as a contact type, so we choose Contact Type.</p>	<p>Choose search type: Contact Type</p>
<p>That shows a second drop-down menu where we choose which Contact Type we're interested in finding. Choose Board Member.</p>	<p>Choose Contact Type: board member</p>
<p>Click Search</p>	<p>Click search</p>
<p>And Sumac produces your list of Board Members!</p>	<p>Point to list.</p>
<p>Another common single-criterion search looks for contacts with a particular communication preference. For example, perhaps you need to find everyone who wants your newsletter.</p>	
<p>Choose the Search Type: Communication Preference, then choose the Communication Preference: Newsletter</p>	<p>Search Type: Comm. Preference Comm. Preference: Newsletter</p>
<p>Click Search.</p>	<p>Click Search</p>
<p>And Sumac finds all the contacts in your database who want your newsletter.</p>	<p>Point to list.</p>
<p>You've just learned basic searching in Sumac! Searching is at the top of every list in Sumac, and it shows the search results in the list of records!</p>	<p>Point to searching area at top. Point to list of data in middle.</p>
<p>When you search in your database, you are asking Sumac to find records in your database which satisfy search criteria that you specify. Search Criteria are the building blocks of your question. They define exactly what information you are looking for. Instead of viewing <i>every</i> record, Sumac responds to your question by showing you only the records that match your search criteria. A Search can be composed of a single criterion or multiple criteria. Let's look at some examples.</p>	<p>Title: Search Criteria add bullets:</p> <ul style="list-style-type: none"> • search criteria define what you are looking for • Sumac searches to show records matching search criteria • searches can have one or multiple search criteria

<p>Find contacts who live in Chicago.</p> <p>Find donations over \$100.</p> <p>Find who attended your recent Gala.</p>	<p>Title: Search with One Criterion</p> <p>Show Contacts list with this search set up, highlight search panel</p> <p>Show Donations list with this search set up, highlight search panel</p> <p>Show Communications list with this search set up, highlight search panel</p> <p>[give viewers time to see these three windows, and call out the search criteria in each case]</p>
<p>Find contacts who live in Chicago or New York.</p> <p>Find donations over \$100 given in the past six months</p> <p>Find contacts who have attended our recent Gala, and have signed up for our newsletter, or have given a donation in the past month.</p>	<p>Title: Search With Multiple Criteria.</p> <p>Show search examples on screen, point to criteria, fade in words 'Multiple Criteria' next to them.</p>
<p>Notice that the different criteria in these examples are linked together using certain words: "and" and "or."</p>	
<p>These connector words connect search criteria together to create more precise searches.</p> <p>The most common connectors are 'AND' and 'OR'. Let's review when each connector is appropriate.</p>	<p>Title: Connectors</p> <p>Fade in the following sentences and circle/highlight the connectors.</p> <p>Find all people with blue eyes and are left handed.</p> <p>Find all donations over \$100 and were given in the 6 months</p> <p>Find all people who have attended our recent Gala, and have signed up for our newsletter or have given a donation in the past month.</p>
<p>Using an AND connector means that the results must satisfy both the criteria in your search. For example, if we are considering people who have glasses and others who have mustaches</p>	<p>Show image with pic of people with glasses, with mustache, with both, with neither</p>

an <i>AND</i> search shows only the people who have both glasses AND a mustache.	Show only those with glasses and a mustache
Using an OR connector means that the search results must meet either the first criterion, or the second criterion, or both.	
an OR search shows the people who have either glasses, or a mustache, or both!	Show face with glasses, face with mustache, and face with glasses and a mustache
Now that we have had a fun look at AND and OR, consider some more realistic examples:	
	Title: When to use AND
When you link search criteria with an AND connector, Sumac finds only the results that satisfy <i>both</i> the criteria in your search. For example, perhaps you need to find contacts who donated in the last month <i>and</i> attended your last event. Because the criteria are connected with an AND, Sumac finds only contacts in your database who did both things. -Contacts who made a donation in the last month, but <i>did not</i> attend your last event, will <i>not</i> be included in the results Sumac finds.	show one circle representing first criterion. show second overlapping circle representing second criterion. merge them together to create Venn diagram. show arrow pointing to the AND in the middle of the Venn diagram
	title: When to use OR
When you link search criteria with an OR connector, Sumac finds results that meet either the first criterion, or the second criterion, or both the criteria. For example, perhaps you want to find contacts who donated in the last month OR attended your last event. Because the criteria are connected with an OR, Sumac finds contacts who did either, or both things.	show one circle representing first criterion. show second circle overlapping representing second criterion. Add shading to all of both circles to indicate OR
If we compare these two searches, you can see that the AND connector only finds contacts who meet both criteria. The OR connector finds contacts who meet either criterion.	Show two diagrams side by side
<i>Now that we've learned some of the basics, check out more training videos to learn more about searching in Sumac!</i>	